

# SAP Business One 9.1 Highlights

June 2014

Customer



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# Objective of this Presentation

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## Purpose

This presentation is intended to provide a solid overview of new developed functional highlights, related to

- SAP Business One 9.1
- SAP Business One 9.1, version for SAP HANA

The highlight presentation describes the highlights and business benefits.

This presentation is targeted for use by SAP employees, SAP Business One partner and SAP customer.

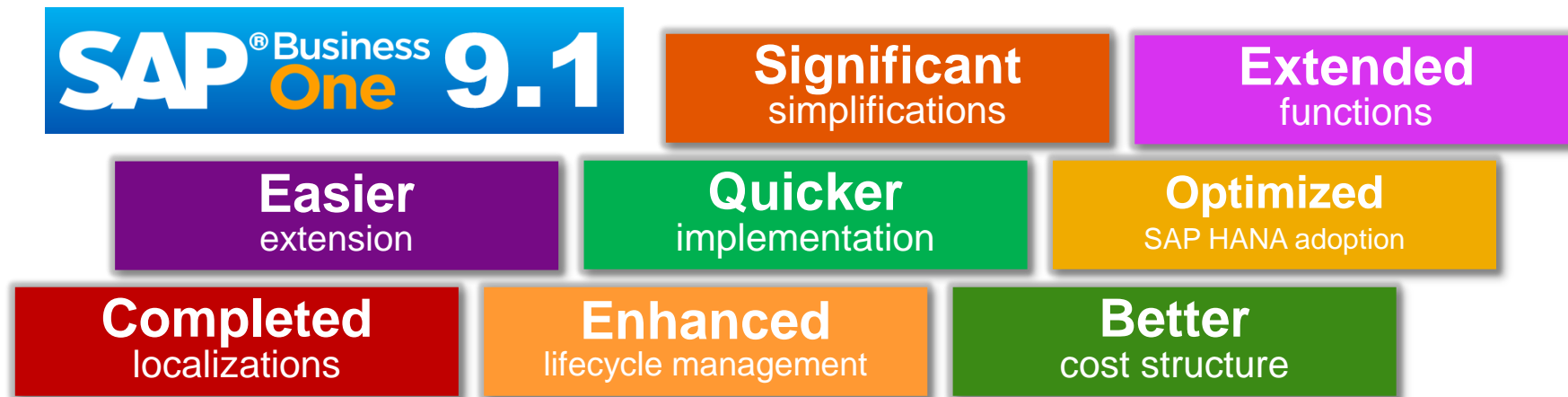
## Complementary resources

For information regarding future directions, refer to Solution Road map.

For more information related to this release, refer to Ramp-up Knowledge Transfer materials and product documentation.

# SAP Business One 9.1 - Overview

- Planned new versions: SAP Business One 9.1 and SAP Business One 9.1, version for SAP HANA
- Release to customer is currently planned for end of Q2 2014
- One common code base for SAP HANA database and Microsoft SQL Server
- Focus on functional improvements and simplifications of implementing, operating, and using SAP Business One





## Business logic and localization

- Enhanced production module (resources and BoM enhancements)
- Inventory item cost valuation based on serial or batch number
- Display balances for goods receipt POs and purchase orders in BP master data
- Enablement of negative payments in payment wizard
- Multiple branches function splits transactions by business unit
- Project enhancements (initially for Russia)
- Rounded-off functions (G/L account determination, Multiple Unit of Measurement, Price Lists, Bin Location, Pick and Pack, and more)
- Fixed assets enhancements
- Extended tax reporting
- Bank Statement processing for additional localizations
- Localization enhancements and legal compliance
- Default values



## Reporting and analytics

- SAP Crystal Reports 2013
- Default settings and report layout (selected countries)



## Extensibility/SDK

- Additional DI/UI objects and services
- Enhanced lifecycle management for extensions
- SAP Business One studio and workflow enhancements



## Infrastructure and architecture

- Permission group authorizations
- Performance improvements
- Security enhancements
- Hiding business functions
- Configurable UI framework
- Copy and paste between SAP Business One grids and MS Excel
- Simplified e-mail and printing process



## Lifecycle management and support

- Remote support platform 3.1



## Specific to SAP Business One 9.1, version for SAP HANA

- Service layer that exposes business objects by Web service
- Role-based work center for analytics and simplified system use (based on HTML5)
- Pervasive Analytics – New action types for Dashboards and Key Performance Indicators (KPIs)
- Supplementary dashboards can easily be created via the Pervasive Analytics Designer (Advanced Dashboards)
- Performance optimization (transactional and reporting)
- Extreme application framework enhancement for partners
- Supported by remote support platform

**SAP**® Business One 9.1

**Significant**  
simplifications

**Extended**  
functions

**Easier**  
extension

**Quicker**  
implementation

**Optimized**  
SAP HANA adoption

**Completed**  
localizations

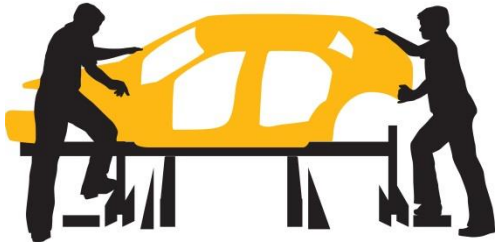
**Enhanced** lifecycle  
management

**Better**  
cost structure

## Business logic and localization

# Enhanced Production Module

## New Resources Module



Administration
Financials
Sales Opportunities
Sales - A/R
Purchasing - A/P
Business Partners
Banking
Inventory
<b>Resources</b>
Resource Master Data
Resource Capacity
Set Daily Internal Capacities
Production
MRP
Service
Human Resources
Reports

### Enhancements

- New module to manage and plan resource capacity
- Ability to capture machine, labor or other resources with associated costs
- Linked to fixed assets and employee data
- Accounts to be used defined in advanced account determination

### Benefits

- Visibility of available capacity to avoid bottlenecks and optimize production plan
- Resource costs are included in the final product cost

# Enhanced Production Module

## Bill of Materials (BoM)

The screenshot displays the SAP Bill of Materials (BoM) interface. The main window, titled "Bill of Materials", shows a list of components for product LM4029 (LeMon 4029 Printer). The components are listed in a table with columns for #, Type, No., Description, Quantity, and Uo... The components are:

#	Type	No.	Description	Quantity	Uo...
1	Item	LM4029MC	Memory Chip	2	
2	Item	LM4029D	LeMon 4029 500 sheet paper c	1	
3	Item	LM4029PH	LeMon 4029 Printer Head	1	
4	Item	LM4029PS	LeMon 4029 Printer Power Su	1	
5	Item	LM4029SB	LeMon 4029 Printer System Bc	1	
6	Item				

The 6th row is highlighted, and a dropdown menu is open, showing options: Item, Resource, and Text. A red box highlights the "Resource" option.

The "Bill of Materials - Component Management - Selection Criteria" dialog box is open, showing the "Add BOM Lines" management task. The "Select BOMs" section includes fields for BOM Product No. (P10003 to P10004), BOM Item Group (PC), BOM Type (Production), BOM Warehouse No., BOM Distr. Rule, and BOM Project. The "Select BOM Lines to Add" section includes a dropdown for "Item" and fields for From and To. The "BOM Line Details to Be Added" section includes fields for Quantity (5.000), Additional Quantity (1.000), Warehouse, Issue Method, and WIP Account. A red box highlights the "BOM Line Details to Be Added" section.

### Enhancements

- New line item types in BoM: resource, text
- Option to group line items based on process flow
- Option to mass update BoMs: add/remove lines
- Values in identical UDFs carried over from BoM to production order

### Benefits

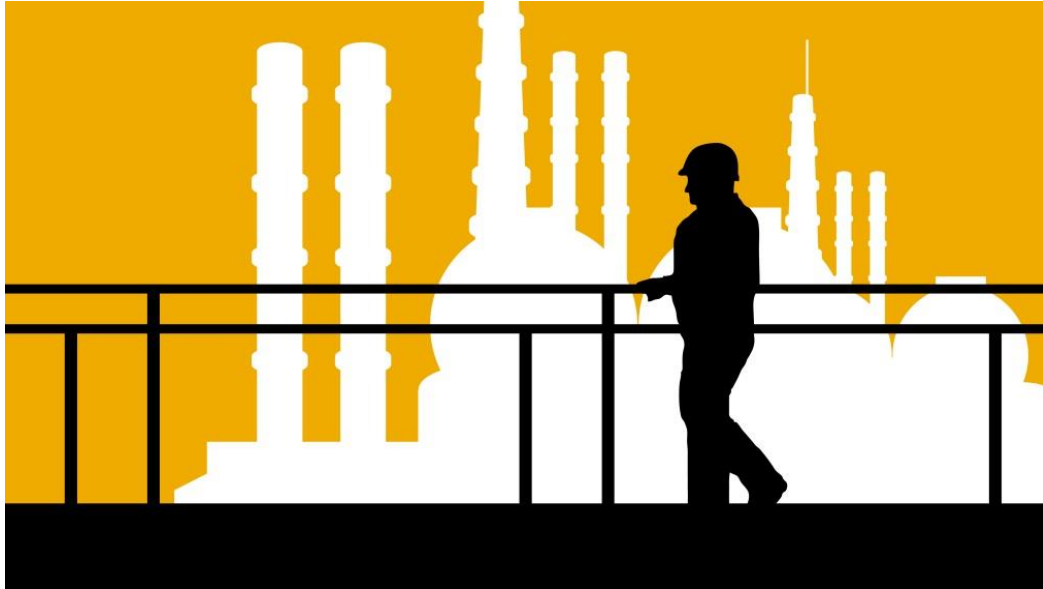
- Process orientated BoM structure
- Easy maintenance of BoM



# Enhanced Production Module

## Production Process

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### Enhancements

- Possibility to edit production order to match the production process flow
- Additional line types inherited from BoM
- Option to include additional quantities e.g. required for production process setup
- Ability to define WIP account on row level

### Benefits

- Tailored production order structure reflecting production process
- Precise WIP data
- More accurate planning data
- Ability to share instructions via production order

# Inventory Item Cost Valuation

Based on serial and batch



## Enhancements

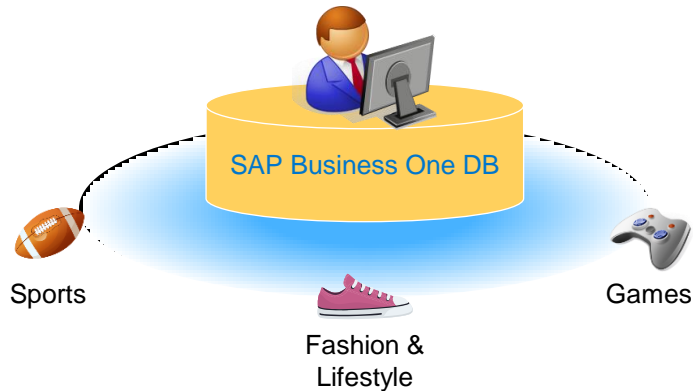
- New valuation method available for serial numbered and batch-managed items
- The cost of an item is managed on the serial or batch number level

## Benefits

- Cost variances can be reflected in the product profitability
- Profitability can be calculated for a specific serial number or batch

# Multiple Branches

## Manage Business by Branches in one Database/Localization



### Core Features

- Create sales and purchasing transaction for a dedicated branch.
- Reporting by branch, e.g. profit and loss statement per branch.
- Warehouse management per branch.
- Restrict usage of business partners by branch.
- All financial transactions will be separated by branches.

### Benefits

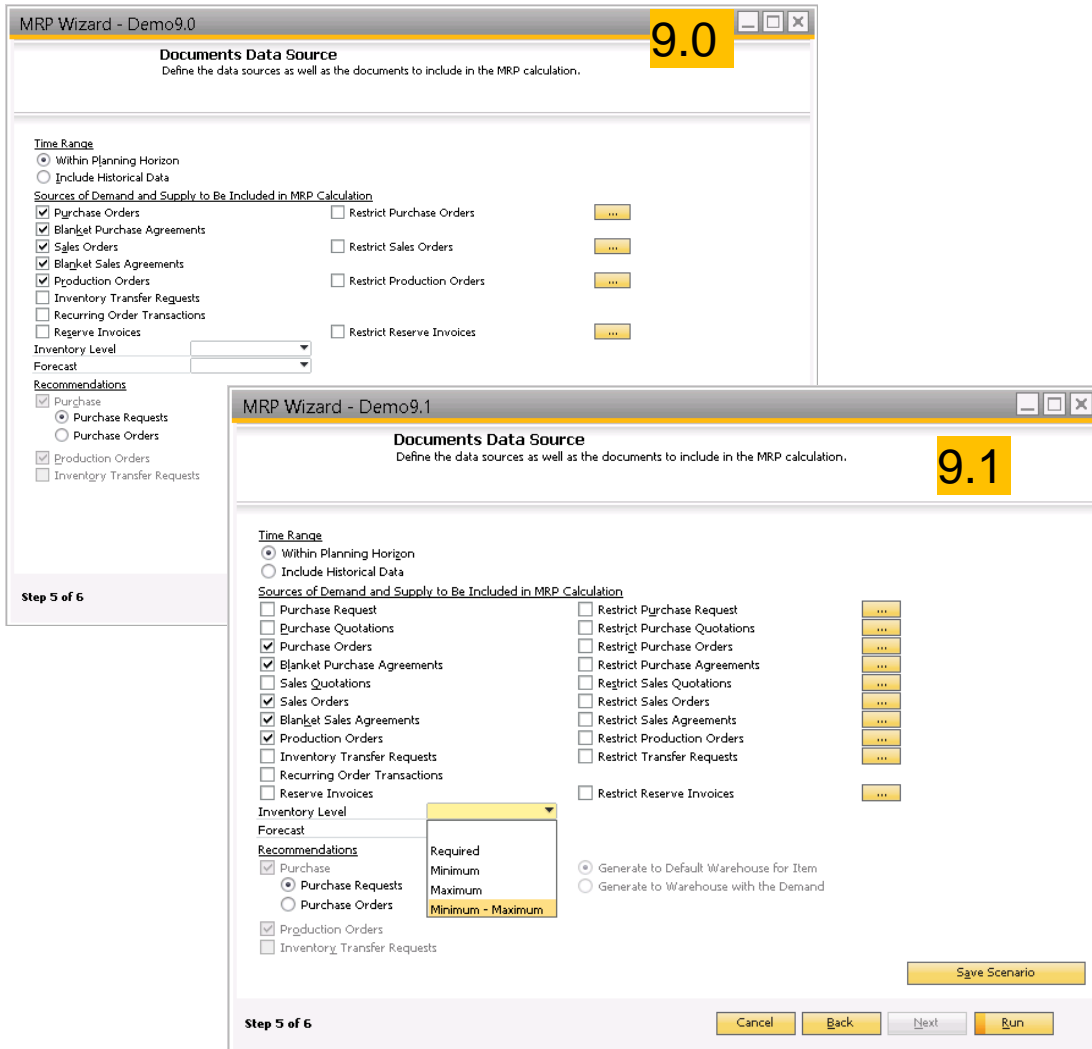
- Manage business by branches\*, in one DB/Localization e.g. product lines, stores, market segments, business units
- increased transparency

\* Notice:

The Multiple Branches function is designed for branches which are not legal entities in the sense of a company. If the branches are legal entities, the intercompany integration solution for SAP Business One is recommended.

# MRP

## Additional Data Sources



## Enhancements

- Introduction of field Component Warehouse in Item Master Data, Planning Tab
- Possibility to select Component Warehouse for make items in Item Master Data, Planning Tab
- Additional selection criteria for documents to be included in MRP
- Option to set Inventory Level to Maximum if inventory quantity is less than minimum
- Option to select multiple MRP forecasts for MRP recommendations > selection screen will open
- in addition, MRP forecasts support zero-quantity items
- Option to change the Order Type in the Order Recommendation

## Benefits

- Ability to more flexibly optimize MRP execution
- More possibilities to optimize the MRP process

# Blanket Agreement Enhancements

## More Selection Criteria

The image shows two SAP dialog boxes. The top one is titled "Blanket Agreement Fulfillment Report - Selection Crit" and has tabs for "Items" and "Vendors". Under "Items", there are fields for "Item Code" (From/To), "Item Group" (set to "All"), and a "Properties" button. The bottom dialog is titled "Draft Sales Blanket Agreement" and contains fields for "BP Code" (C20000), "BP Name" (Maxi-Teq), "Contact Person" (Max Teq), "Telephone No." (555-0137), and "E-Mail" (max.teq@maxi-teq.sap.com). It also has fields for "No." (Primary), "Agreement Method" (Items Method), "Start Date" (05/08/2014), "End Date", "Termination Date", and "Signing Date" (05/08/2014). A "Description" field is present. Below these are tabs for "General", "Details", "Documents", "Attachments", and "Recurring Transactions". The "General" tab shows "Agreement Type" (General), "Status" (Draft), "Ignore Prices Specified in Blanket Agreement" (checked), "Payment Terms" (highlighted in red), "Payment Method" (Incoming BT 02, highlighted in red), "Settlement Probability %" (0.000), "Owner", "Renewal" (unchecked), and "Reminder" (Day(s)). There are "Add", "Cancel", and "Copy To" buttons at the bottom.

## Enhancements

- Possibility to run the blanket agreement fulfillment report by: item group, item properties, vendor group, vendors properties
- Authorizations moved to sales AR and Purchasing AP - scope expanded
- Option to select payment method in the blanket agreement – applied when drawn

## Benefits

- Better usability
- User role based access control

# Advanced G/L Account Determination Easier Migration

Priority	Warehou...	Business...	VAT Number	Ship-to Country	Ship-to State	VAT Code	BP Code	BP Type	Description	Active	From Date	To Date	Revenue Account
1	01	All	All	All	All	All	All	All		<input checked="" type="checkbox"/>			↔ 400010
2	01	All	All	All	All	All	All	All		<input checked="" type="checkbox"/>			↔ 400020

## Enhancements

- Ability to export the preview display of the 'Advanced G/L Account Determination Rules' form to Excel
- Added Determination Criteria button to the Advanced G/L Account Determination rules form

## Benefits

- Easier investigation, reading and cross checking of the expected rules before migration

#	Type of Account	Account Code	Account Name	Advanced Rules
	Inventory Account	↔ 13400000-01-001-01	Inventory - Finished Goods (HO, USA, GA )	
	Cost of Goods Sold Account	↔ 51100000-01-001-01	COGS - Domestic (HO, USA, GA )	

# Maximum Weight Allocation Restriction In Bin Locations

**Bin Location Master Data**

Warehouse: 05    Aisle: A1    Shelf: S4    Level: L2  
Bin Location Code: 05-A1-S4-L2

**Bin Location Properties**

Inactive:   
Receiving Bin Location:     Exclude from Auto. Alloc. on Issue:   
Description:   
Item Weight: 600kg  
No. of Items: 1  
Alternative Sort Code:   
Minimum Qty:   
Maximum Weight: 1,000kg

**Item Master Data**

Item No.: Manual R00002  
Description: Printer Paper A4 Recycled  
Foreign Name:   
Item Type: Items  
Item Group: Items  
UoM Group: Paper  
Price List: Base Price

General    Purchasing Data    Sales Data    Inventory Data

Set Inv. Method By: Warehouse  
UoM Code: Pack  
UoM Name: Pack  
Weight: 2.5kg

## Enhancements

- Postings of goods to bin locations can be restricted by weight
- A maximum weight can be defined for each bin location
- The weight per UoM is defined per item

## Benefits

- Control weight restrictions of bin locations
- Avoid weight overload and risk of accidents

# Weight Factor for Unit Conversion

## For Simplified Unit of Measure Setup

**Group Definition - Screws, bolts, nails - Setup** 9.0

#	Alt. Qty	Alt. UoM	=	Base Qty	Base UoM
1	1	Carton	=	1	Carton
2	10	Kilograms Screws	=	1	Carton
3	12	Kilograms Bolts	=	1	Carton
4	22	Pound Screws	=	1	Carton
5	26.45	Pound Bolts	=	1	Carton

**Item Master Data** 9.1

Item No. Manual 200007  
 Description Screws  
 Foreign Name  
 Item Type Items  
 Item Group Items  
 UoM Group → Screws, bolts, nails  
 Price List Base Price

General Purchasing Data Sales Data

Set Inv. Method By Warehouse  
 UoM Code Carton  
 UoM Name Carton  
 Weight 10kg

**Group Definition - Screws, bolts, nails - Setup**

#	Alt. Qty	Alt. UoM	Weight Factor	=	Base Qty	Base UoM
1	1	Carton		=	1	Carton
2	1	Kilograms	kg	=	1	Carton
3	1	Pound	Lb	=	1	Carton
4	0.000		mg g kg Oz Lb T	=		Carton

### Enhancements

- New weight field for UoM conversion in item master inventory tab
- UoM conversion can use item weight
- Use case example:  
If a company sells several items by weight, but manages them in a different UoM in the inventory, the UoM Group definition can be simplified
- Further, UoM Conversion can use an item UDF in the same way

### Benefits

- Reduced effort with a simplified UoM setup



# Price List Enhancements

## Copy Price Reduction on Unit of Measure level

The image shows two overlapping SAP dialog boxes. The top dialog, titled 'Regular Sales Price - UoM Prices', displays a table for item R00001 with columns for UoM Code, UoM Name, Base Price, Reduce By %, Unit Price, and Auto. The bottom dialog, titled 'Copy UoM Reduce By - Selection Criteria', allows copying reduction criteria from one price list to another, with options for 'Copy From' and 'Copy To' and radio buttons for update strategies.

#	UoM Code	UoM Name	Base Price	Reduce By %	Unit Price	Auto
1	Pack	Pack	7.50 \$		7.50 \$	<input type="checkbox"/>
2	6Pack	6 Pack	45.000000 \$	5.000	42.75 \$	<input checked="" type="checkbox"/>
3	Carton	Carton	180.000000 \$	15.000	153.00 \$	<input checked="" type="checkbox"/>
4				0.000		<input checked="" type="checkbox"/>

**Copy UoM Reduce By - Selection Criteria**

**Copy From**

Price List: Regular Sales Price  
Item No.: R00001  
UoM Code: Multiple

**Copy To**

Price List: Regular Sales Price  
UoM Group: Paper  
Item No.: From: To:  
Item Group: All  
Properties: Ignore

Replace All UoM Prices  
 Update Only Existing UoM Prices  
 Add New UoM Prices Without Updating Existing Prices  
 Add New UoM Prices and Update Existing Prices  
 Only Copy to UoM with "Auto" Selected

### Enhancements

- Possibility to mass update prices in price list
- UoM items in a price list can be copied to UoM items in any other price lists

### Benefits

- Easy management of pricing updates

# Pick and Pack Enhancements

## For Optimized Pick Processes

The screenshot displays the SAP Production Order interface. At the top, the 'Production Order' header shows details like Type (Standard), Status (Planned), Product No. (LM4029), and Warehouse (01). Below this is a table of components. A context menu is open over the table, with 'Generate Pick List' and 'View Pick Lists' highlighted. The 'Pick List Generation Wizard' dialog is also visible, showing 'Pick List Generation Parameters' and a list of options to split pick lists by, such as Business Partner, Document Type, Item Group, and Warehouse.

#	Type	No.	Description	Base ...	Planned...	Issu	...	Issue Me...	Branch
1	Item	LM4029MC	Memory Chip	2	10			Backflush	
2	Item	LM4029D	LeMon 4029 500 shee	1	5			Backflush	
3	Item	LM4029PH	LeMon 4029 Printer H	1	5		667	01	Backflush
4	Item						65	01	Backflush
5	Item						638	01	Backflush
6	Item								

### Enhancements

- Generate and view pick lists via context menu in A/R reserve invoices, inventory transfer requests, and production orders
- Additional parameters for splitting in the Pick List Generation Wizard

### Benefits

- Start picking process directly from document
- More flexibility to handle pick processes

# Fixed Assets

## Cost Center Support

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### Enhancements

- Cost center information supported in A/R documents and fixed assets sales documents
- Cost center and project information automatically populated in documents from fixed assets master data
- Ability to cancel depreciation runs
- Transfers within an asset class – possibility to select between zero out postings and no postings

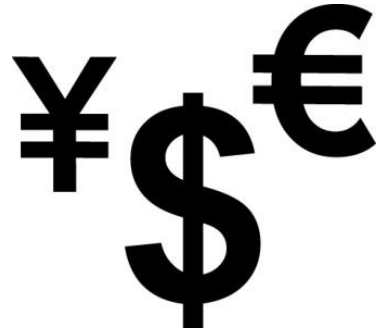
### Benefits

- More easily track internal costs for your fixed assets
- Automate the recording of cost information

# Extended Tax Reporting

## Advanced Solution to Tax Reporting

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### Enhancements

- **BAS Codes Setup** offers a range of options in designing structure and rules for specific tax declarations
- Existing functionality enabled in more localizations (CY, FR, AT, IT, PA, JP, PL, HU, CH, SE, DK, KR, FI, NO, SE, ZA, CN)

### Benefits

- Automatically includes new postings in reports you have created and saved
- Offers users and partners the capability to build financial and tax reports from scratch by referring to financial objects such as tax codes, G/L accounts, ad-hoc manual inputs and formulas
- Provides easy & precise tracking of documents reported to authorities
- Can be used as a base for electronic reporting

# Default Values for Accelerated Implementation

**Numbering Series - Setup**

Select Series Type for Setup: Document

#	Name	Number			String		Remarks	Group	Period Ind.	Cancellation	Lock	Digital Series
		First No.	Next No.	Last No.	Prefix	Suffix						
1	AR Inv	1	1	199999			1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2	AR CrMe	200000	200000	259999			1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3	OtSaInv	260000	260000	289999			1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4	OtSaCM	290000	290000	299999			1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5	AP Inv	300000	300000	399999			1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6	AP CrMe	400000	400000	459999			1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7	OtPuInv	460000	460000	489999			1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8	OtPuCM	490000	490000	499999			1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
9	BankTr	500000	500000	559999			1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10	PettyCTr	560000	560000	599999			1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
11	MIS Tr	600000	600000	699999			1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Display Series Linked to Selected Period(s) Indicator: All Periods

## Enhancements

- New chart of accounts + determination rules + simplified UI template for small businesses in the US\*
- New chart of accounts + determination rules + simplified UI template for small businesses in Mexico\*
- Document numbering defaults for Belgium
- ...

## Benefits

- Accelerated implementation for small businesses in selected countries

\* Notice: available at ramp-up start

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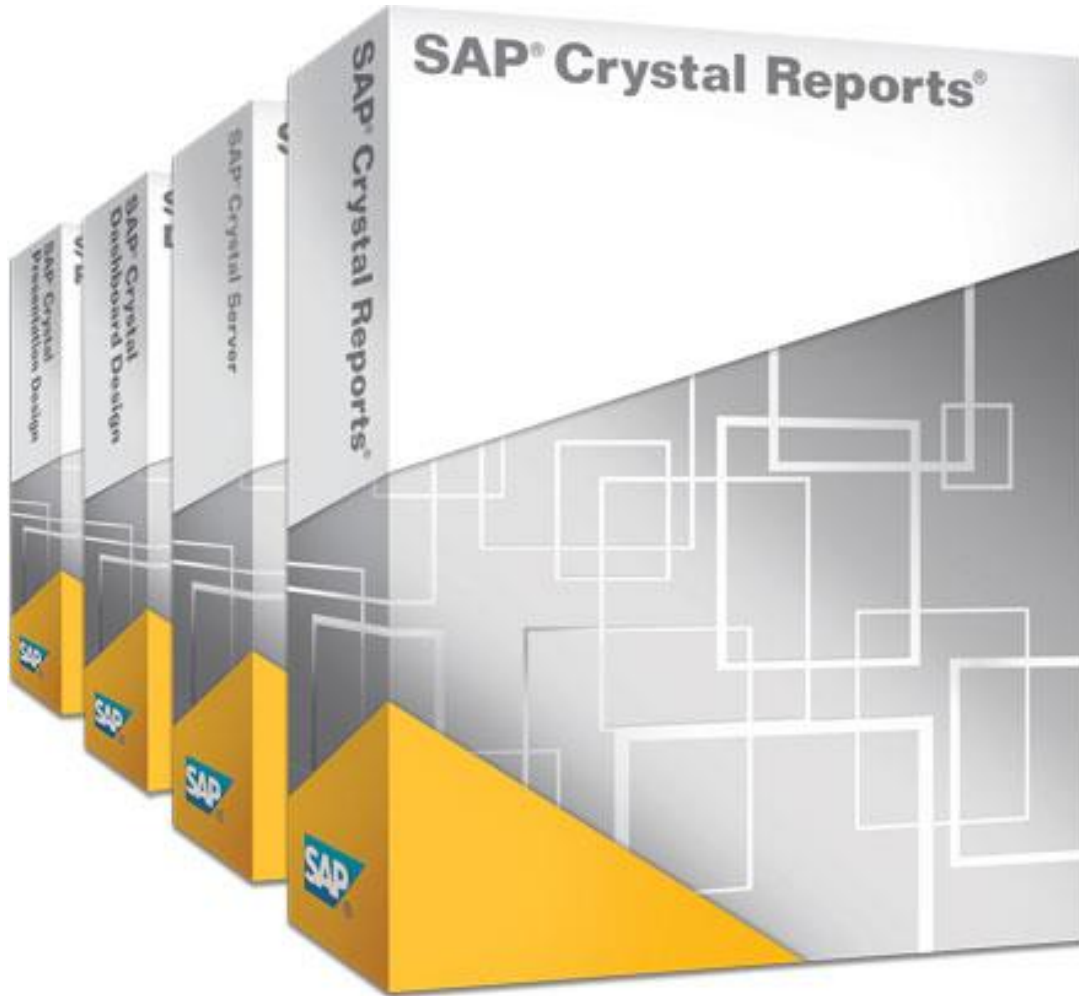
**Enhanced** lifecycle  
management

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## ▶▶▶ Reporting and analytics

# SAP Crystal Reports 2013

Further Enrichments to support Partner and Customer



## Enhancements

What's new in SAP Crystal Reports products:

- Supports MS Windows 8/ Windows Server 2012
- Streamlined report design
- Improvements to data sources
- Mobile and viewer support
- OEM and developer features

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▶▶▶ Lifecycle management and support



# Lifecycle Management

## Remote Support Platform for SAP HANA



### Enhancements:

- The Remote Support Platform (RSP) support available for SAP Business One on both the SAP HANA database and on Microsoft SQL Server
- RSP processes and reports adapted for the SAP HANA database\*

### Benefits:

- Reduced TCO for customers and partners due to automation, faster installation and reliable upgrades as well as simplified landscape management (supportability and maintainability)
- Less time and money spent on maintenance and support

\*RSP will not support backup, healing task and DB upload tasks for HANA Databases

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 **Extensibility / SDK**

# Enhanced lifecycle management for extensions

## New lightweight approach for Add-On deployment

The screenshot displays the SAP Business One Extension Manager interface. On the left, the 'Extension Registration Data Generator' window is open, showing a sidebar with categories like 'Basic Information', 'Extension File', 'Register DLLs', 'SBO Compatibility', and 'Shared Parameters'. The main area contains fields for 'Extension Name (Mandatory)', 'Extension Version (Mandatory)', 'Extension Provider', 'Extension Namespace', 'Supported Database (Mandatory)' (with radio buttons for HANA, MSSQL, and Both), and 'Contact Data'. Below this, the 'SAP Business One Extension Manager' window is visible, showing a table of installed extensions and a 'Company Assignment Wizard' dialog box. The wizard has steps for 'Specify Company', 'Specify Parameters', and 'Specify Startup Mode', with a 'Next' button at the bottom right.

Name	Version	Provider	Parameters	Status	More Info
SBOAddOnProject1421	1	1	<a href="#">Edit</a>	OK	<a href="#">Details</a>
GG1	1.0	TS	<a href="#">Edit</a>	OK	<a href="#">Details</a>
SBOAddOnProjectTest	1	1	<a href="#">Edit</a>	OK	<a href="#">Details</a>

User Name	Startup Mode
B1i	Default <a href="#">Edit</a>
Workflow	Default <a href="#">Edit</a>
AAA	Default <a href="#">Edit</a>
manager	Default <a href="#">Edit</a>

### Enhancements

- End-to-end lifecycle management for add-ons and extreme apps within SAP Business One. Deployment no longer requires InstallShield or equivalent 3rd party tools
- Ability to combine different Add-On binaries for 32/64 bit as well as related extreme apps in one extension package
- Remote deployment and management via Extension Manager platform
- Integrated development experiences with SAP Business One Studio

### Benefits

- Simplified extension development & lifecycle management including add-ons & extreme apps
- Remote control the extension lifecycle management easily without end-user interaction or system administration privilege

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 **Infrastructure and architecture**

# Permission Groups

## Role-Based User Administration

The image shows two overlapping SAP screenshots. The top window is titled 'Permission Groups' and shows a 'Create Group' dialog. The 'Name' field is set to 'Sales' and the 'Description' is also 'Sales'. A list of existing groups is shown on the left: Finance, Sales (highlighted), Purchase, and Inventory. Below this, a 'Users' table lists three users: Brad Thompson (Sales), Merlina Francis (Purchase), and Mary Heske (Logistic). The bottom window is titled 'Authorizations' and shows a list of subjects and their corresponding authorization levels. The 'Sales - A/R' group is expanded, showing various subjects like 'Blanket Agreement', 'Sales Quotation', 'Sales Order', etc., with authorization levels ranging from 'No Authorization' to 'Full Authorization'.

#	User Code	User Name	Department
1	brad	Brad Thompson	Sales
2	merlina	Merlina Francis	Purchase
3	mary	Mary Heske	Logistic
4			

Subject	Authorization
▶ General	Various Authorizations
▶ Customization Tools	No Authorization
▶ Administration	Various Authorizations
▶ Financials	Various Authorizations
▶ Sales Opportunities	No Authorization
▼ Sales - A/R	Various Authorizations
▶ Blanket Agreement	No Authorization
Sales Quotation	Full Authorization
Sales Order	Full Authorization
Delivery	Read-Only
Return	Read-Only
A/R Down Payment Invoice	Full Authorization
A/R Invoice	Read-Only
A/R Invoice + Payment	No Authorization
A/R Credit Memo	Read-Only
A/R Reserve Invoice	No Authorization
Recurring Transactions	No Authorization
Document Generation Wizard	No Authorization
Document Draft	Full Authorization

### Enhancements

- Permission groups enable customers to define role-based authorizations in SAP Business One
- Administrators can create permission groups containing sets of general authorizations
- A user can be assigned to one or multiple groups

### Benefits

- Reduced effort for user administration

# Hiding Business Functions For Faster Implementation

The image shows two overlapping SAP configuration windows. The background window is 'General Settings' with a 'Hide Functions' tab selected. It contains a list of business functions with checkboxes: Budget (unchecked), Payment Wizard (checked), Dunning Wizard (unchecked), Cost Accounting (unchecked), Serial Numbers and Batches (unchecked), Production (unchecked), MRP (unchecked), and Units of Measure (unchecked). The foreground window is the 'Express Configuration Wizard' at step 1, 'Company Details'. It has a progress indicator and a 'Help' link. Below the title, it repeats the instruction: 'If your company does not use one or more of the following functions, you can hide them by selecting the respective option(s):'. The list of functions is identical to the General Settings window, with all checkboxes currently unchecked. Navigation buttons 'Update', 'Cancel', 'Back', 'Next', and 'Finish' are visible.

## Enhancements

- Option to remove unused functions from the user interface at company level, such as:
  - Budget
  - Payment Wizard
  - Dunning Wizard
  - Cost Accounting
  - Serial Numbers and Batches
  - Production
  - MRP
  - Units of Measures
- Company level settings changeable at any time
- Configuration via Express Configuration Wizard or General Settings

## Benefits

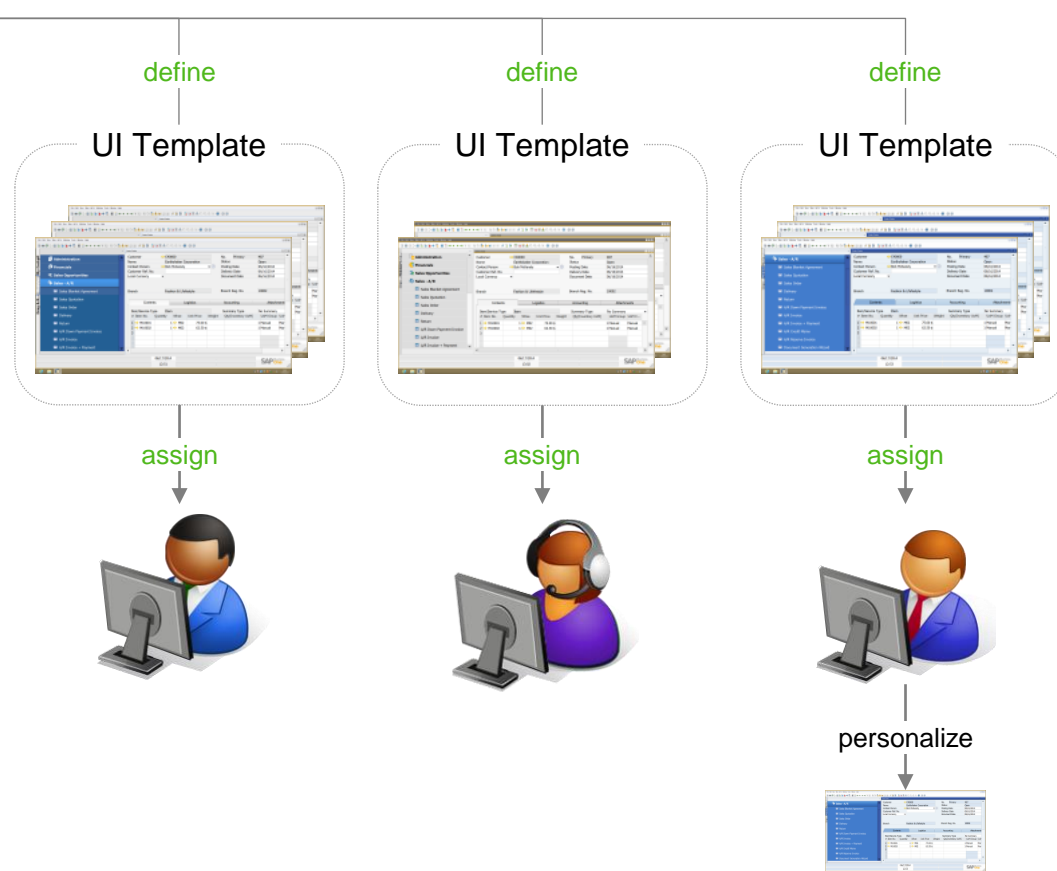
- Switching off complete business functions makes implementation faster.

# Configurable UI Framework

## Adapt UIs to the Needs of End Users



Administrator



### Enhancements

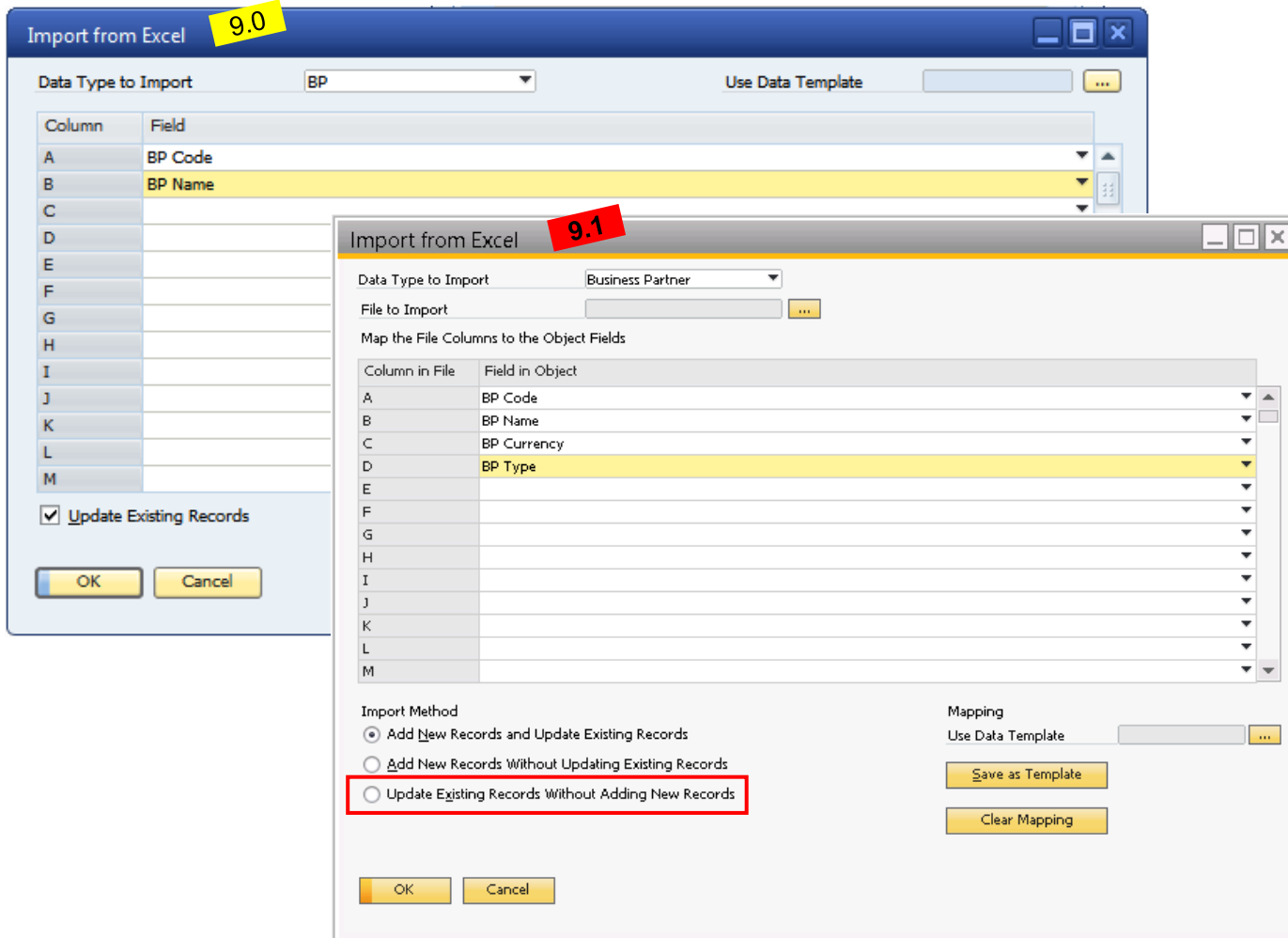
- UI templates allows adaptation of standard UIs  
→ Option to hide, inactivate and relocate fields
- Administrator can assign UI templates to end users
- Each end user can personalize UIs himself

### Benefits

- Simplified UIs improve user experience and productivity
- Further refinement of the authorization concept: A user can only view or edit information on their own authorization

# Data Import via Excel

More option and fields supported



## Enhancements

- Import changes without adding new records
- Additional fields for BPs and items including object properties and UDFs are supported

## Benefits

- More data import and integration scenarios can be covered by the Excel import tool, including migration



# Maximize Grid

## Simply enlarge

The image shows a SAP Sales Order document with a grid of items. A context menu is open over the first row, with the 'Maximize/Restore Grid' option highlighted in red. A yellow arrow points from this menu to a second screenshot showing the grid maximized to fill the window.

#	Item No.	Item Description	Quantity	Unit Price	Disc
1	A00004	Rainbow Farbdrucker 5.0	3	82,50 EUR	
2	A00005	Rainbow Farb	3	93,50 EUR	
3	A00006	Rainbow 1200	3	115,50 EUR	
4	B10000	Etikettendrucker	4	71,50 EUR	
5	C00001	Motherboard	3	60,50 EUR	
6	C00002	Motherboard	3	71,50 EUR	
7	C00003	Quadcore Pro	3	187,00 EUR	
8	C00004	PC Gehäuse m	1	49,50 EUR	

#	Item No.	Item Description	Quantity	Unit Price	Discount %	Tax Code	Total (LC)
1	A00004	Rainbow Farbdrucker 5.0	3	82,50 EUR	0,0000	A2	247,50 EUR
2	A00005	Rainbow Farbdrucker 7.5	3	93,50 EUR	0,0000	A2	280,50 EUR
3	A00006	Rainbow 1200 Laserdrucker	3	115,50 EUR	0,0000	A2	346,50 EUR
4	B10000	Etikettendrucker	4	71,50 EUR	0,0000	A2	286,00 EUR
5	C00001	Motherboard BTX	3	60,50 EUR	0,0000	A2	181,50 EUR
6	C00002	Motherboard MicroATX	3	71,50 EUR	0,0000	A2	214,50 EUR
7	C00003	Quadcore Prozessor 3,4 GHz	3	187,00 EUR	0,0000	A2	561,00 EUR
8	C00004	PC Gehäuse mit Netzteil	1	49,50 EUR	0,0000	A2	49,50 EUR
9	C00005	WLAN-Karte	1	22,00 EUR	0,0000	A2	22,00 EUR
10							

## Enhancements

- Ability to maximize the grid to the whole form size or switch it back to the normal size by just one click

## Benefits

- Improve user experience for documents with high number of items

# Copy & Paste between SAP Business One Grids and Excel

## For Editing Data in Excel

The screenshot shows the SAP Business One interface for a Goods Receipt PO. The top section contains fields for Vendor (V30000), Name (Blockies Corporation), Contact Person (Michael Morgan), Vendor Ref. No., BP Currency (EUR), and Branch (OEC). Below this is a grid with columns: #, Item No., Item Description, Quantity, Whse, Bin Location Allocation, and Total (Doc). The grid contains 10 rows of data. A context menu is open over the grid, with 'Copy Table' highlighted in a red box. A yellow arrow points from the 'Copy Table' option to an Excel spreadsheet in the foreground. The Excel spreadsheet shows the same data from the SAP grid, with columns A through G. The data in Excel is as follows:

	A	B	C	D	E	F	G
1	Item No.	Item Description	Quantity	Whse	Bin Location	Total (Doc)	Weight
2	R00001	Printer Paper A4 White	500	2		1,250.00 EUR	1,500kg
3	R00002	Printer Paper A4 Recycled	500	2		750.00 EUR	1,250kg
4	A00005	Rainbow Color Printer 7.5	140	1		28,000.00 EUR	
5	A00004	Rainbow Color Printer 5.0	50	1		12,500.00 EUR	
6	C00005	WLAN Card	300	1		9,000.00 EUR	
7	C00007	Hard Disk 3TB	100	1		25,000.00 EUR	
8	I00010	SLR M-CAM 40C	30	1		9,000.00 EUR	
9	P10002	PC - 12x core, 64GB, 5 x 150GB S	30	1		20,700.00 EUR	

### Enhancements

- Copy complete transaction item table to Excel
- Paste a selected table area from Excel to SAP Business One transaction item table

### Benefits

- Enable end user to edit large table data in their familiar UI (Excel)

# Simplified E-Mail and Printing

## Scope Enhancements

**Print Preferences**

General | Per Document | Per Ref

Document: **Purchase Request**

Print Layout Designer and Crystal Reports Preferences

When Adding Document:

Export to MS-Word

Print Document

E-Mail Document

Export to PDF

Print Layout Designer Preferences Only

Print Discount Data

Print Mfr Catalog No. Instead of Item Number

Print Amounts

E-Mail Subject

E-Mail Body

Update | Cancel

---

**Business Partner Master Data**

Code: Manual C20000 Customer

Name: Maxi-Teq

Foreign Name:

Group: Construction

Currency: US Dollar

Federal Tax ID: US25-987634

Account Balance: 29,446.80

Deliveries: 23.85

Orders: 6,797.25

Opportunities: 6

General | Contact Persons | Addresses | Payment Terms | Payment Run | Accounting | Properties | Remarks

Amanda Costner

**Max Teq**

Define New

Set as Default

Contact ID: Max Teq

First Name: Max Teq

Title: Mr.

Middle Name:

Position: CEO

Last Name:

Address: 4417 Stonebridge Rd, Northam

Telephone 1: 555-0137

Telephone 2:

Mobile Phone: 555-0188

Fax: 555-0138

E-Mail: max.teq@maxi-teq.sap.com

**E-Mail Group: Accounting**

Active

Inserted Predefined Texts

Inserted Predefined Texts

## Enhancements

- Option to assign business partner contacts to an e-mail group.  
E.g., you could create an e-mail group for “accounting” so that SAP Business One can send e-mails to a department instead of just one contact.
- Two new output methods available when adding a marketing document: Send e-mail and export to PDF
- Ability to maintain a default e-mail subject and body for each document (static text only)
- Ability to send selected documents from a list as e-mails to recipients

## Benefits

- More options for sending documents to partners via e-mail

**SAP**<sup>®</sup> Business  
**One** 9.1

**Significant**  
simplifications

**Extended**  
functions

**Easier**  
extension

**Quicker**  
implementation

**Optimized**  
SAP HANA adoption

**Completed**  
localizations

**Enhanced** lifecycle  
management

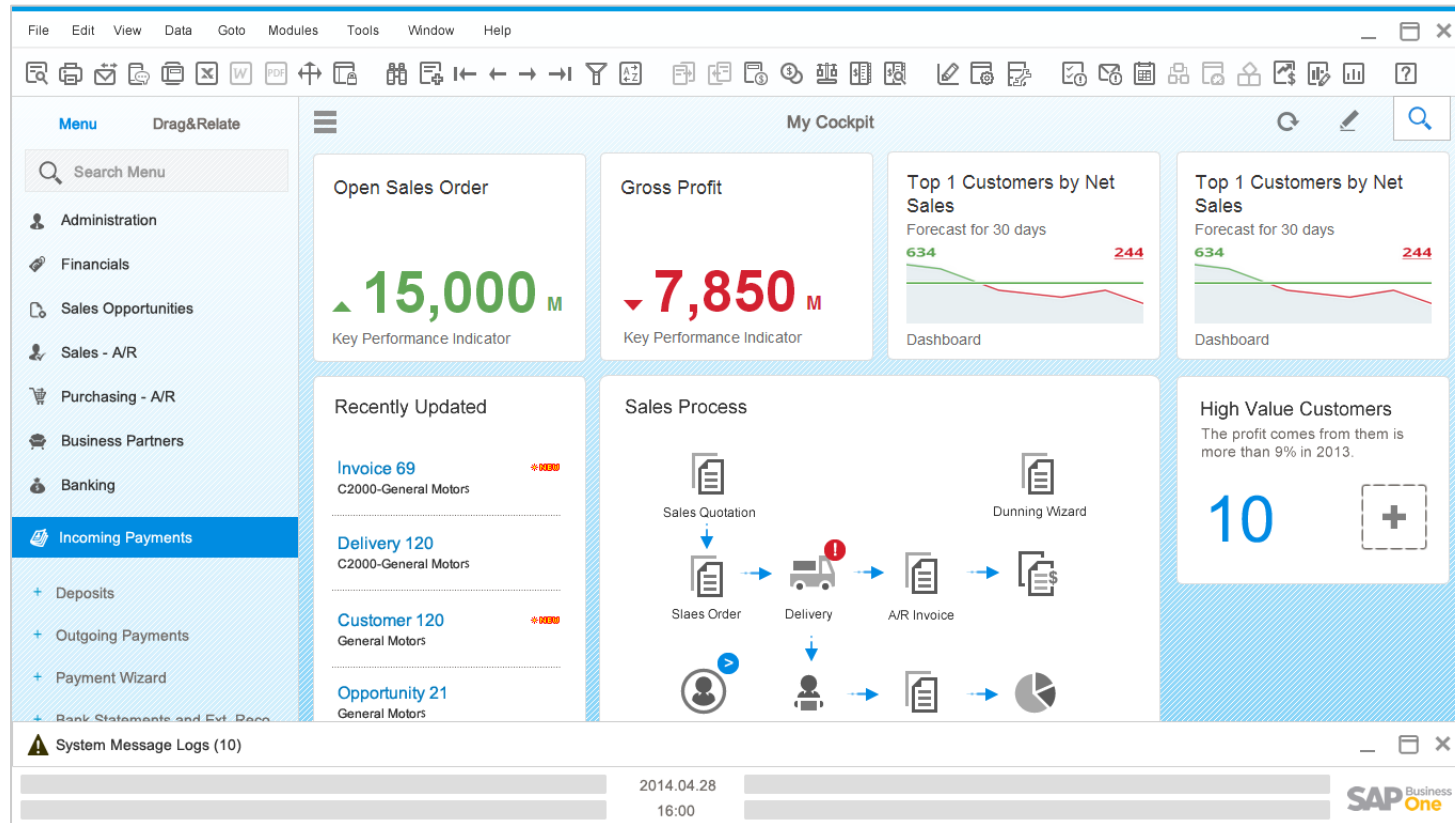
**Better**  
cost structure

➤➤➤ Specific to SAP Business One 9.1, version for SAP  
HANA

# New Role-based cockpit for analytics and simplified system

## Based on HTML5 technology

Version for  
SAP HANA only



## Enhancements

- New cockpit based on HTML5
- Predefined cockpits for sales, purchasing, finance and inventory
- Workbench Widget (see next slide)
- New “Count Widget” – counts sales orders not delivered, open A/R invoices, purchase orders not received, open A/P invoices, open inventory transfer requests. Create new Count Widgets based on user defined queries
- New “Recently Updated Widget” which reflects new and updated master data, marketing documents, chart of accounts and many more types of information

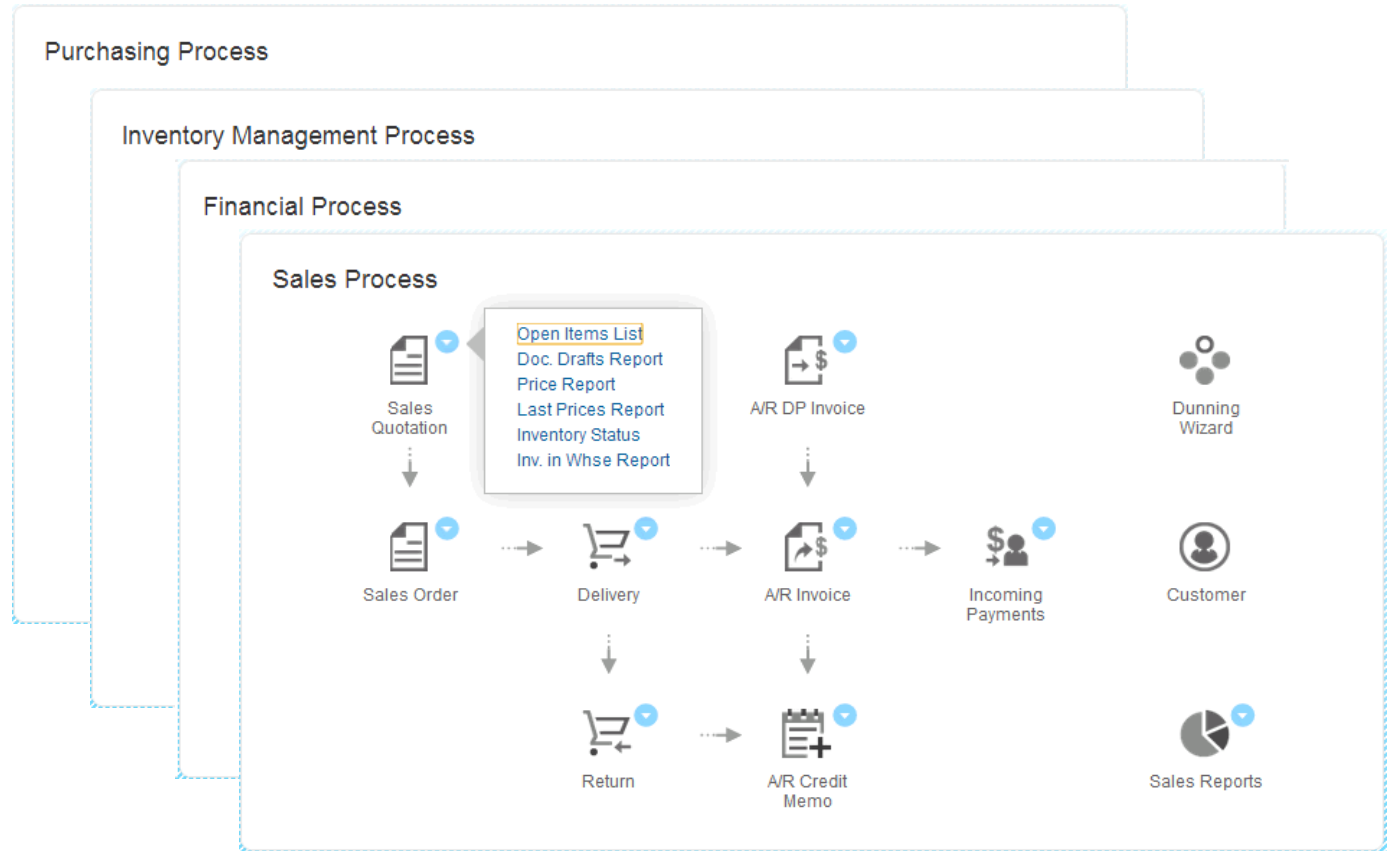
## Benefits

- Simplifies access to information
- Improves user experience due to HTML5 technology

# Workbench

New widget to cover most of the daily operation

Version for  
SAP HANA only



## Enhancements

- Process flow widget to create and manage documents for:
  - Sales
  - Purchasing
  - Inventory management
  - Financials

## Benefits

- Guides user through key business processes
- Provides easy access to related functions

# Pervasive analytics – Insight to action

## Enhanced feature set for Pervasive Analytics Dashboards and KPIs

Version for  
SAP HANA only

The image shows the 'Edit Action (Dashboard)' configuration window and a dashboard view. The configuration window includes:

- Action Name: Open SAP B1 Window 1
- Target SAP B1 Window: Business Partner Master Data
- Data Binding: Dashboard Field (Customer Code) → Target SAP B1 Window Item (BP Code)

The dashboard view shows a bar chart with values ranging from 0 to 20,000. A context menu is open over the chart, listing actions: Open BP Form, Open ES, Customer 360, Inventory 360, and Financial 360. A red arrow points to the menu with the text: 'Action List triggered by right click the column'.

### Enhancements

- Ability to relate business actions to pervasive dashboards and KPIs
- Available action types:
  - Open SAP B1 Window to open B1 forms, such as Master Data
  - Trigger Enterprise Search
  - Link to SAP B1 Window, to show dashboard in sidebar
  - Open Advanced Dashboard (see next slide for a description of advanced dashboards)

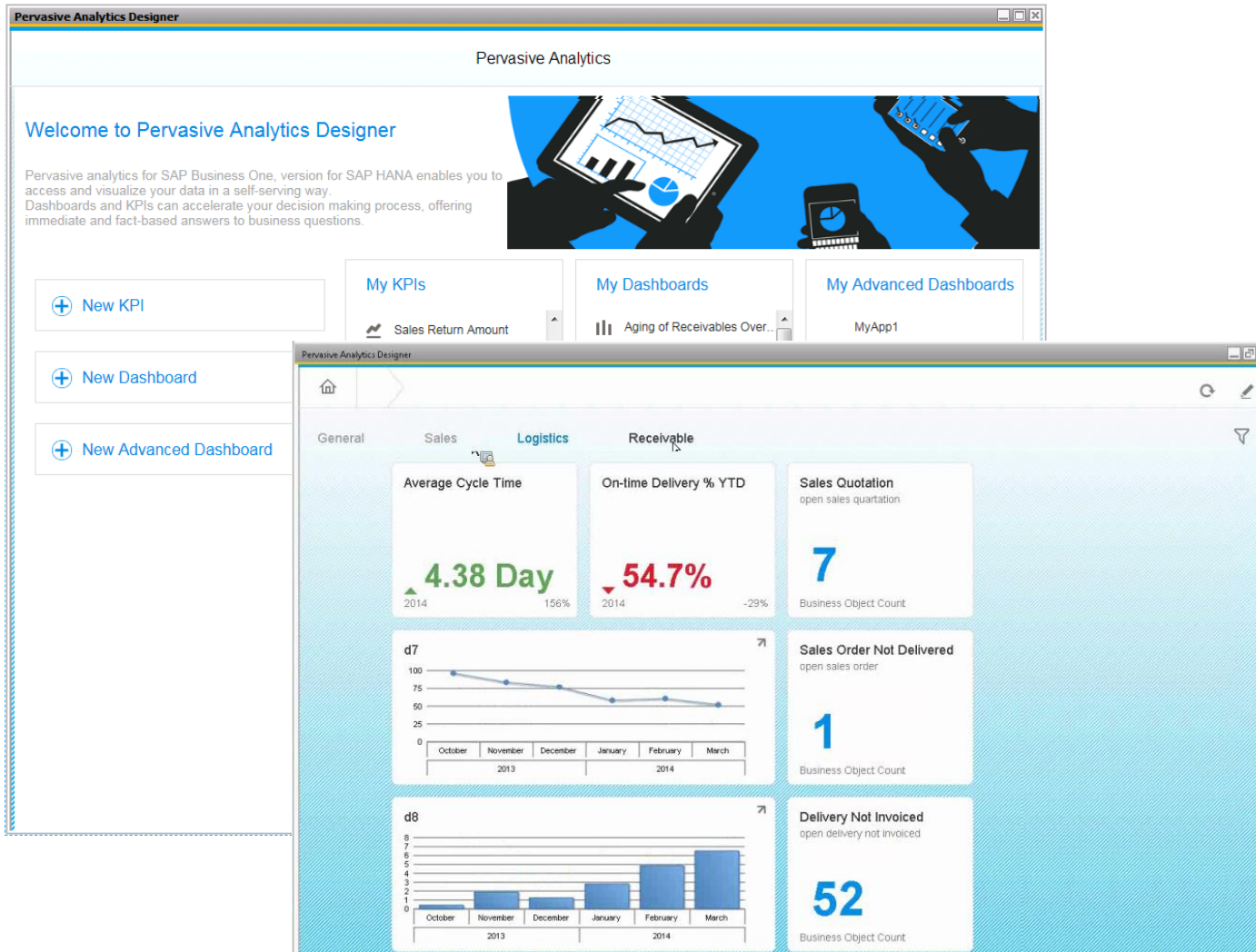
### Benefits

- Drill down into business details
- Translate insights into actions

# Pervasive analytics – Advanced Dashboards

## Supplementary Dashboard to display related, critical data

Version for  
SAP HANA only



### Enhancements

- Ability to create supplementary dashboards to display related data for pervasive dashboards or KPI widgets
- Add filters to break down the displayed results
- Display critical data grouped on a dedicated dashboard

### Benefits

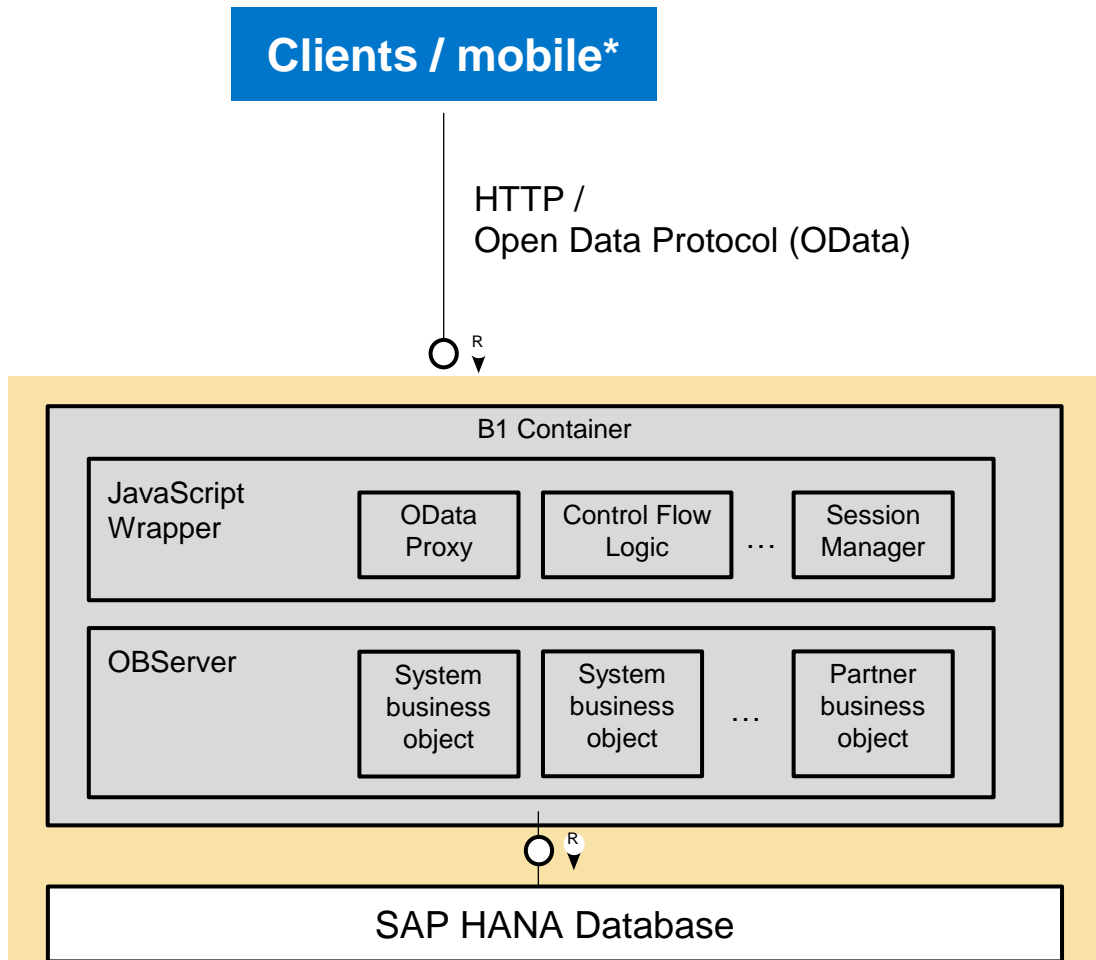
- Quick access to related business analysis and KPIs



# Service layer that exposes business objects by Web service

Access system and partner business objects via easy-to-use OData protocol

Version for  
SAP HANA only



## Enhancements

- SAP Business One service layer provides server-side web access to system and partner business objects via easy-to-use OData protocol
- New state of the art technology to read and write data through HTML5 technology
- Parallel processing
- Well-defined APIs with similar objects and functional coverage compared to DI API
- High Availability support (auto restore session)

## Benefits

- Increased data throughput due to parallel processing
- Simplified landscape and lightweight, web-based development
- Easy development of mobile applications
- Capability to extend extreme applications to address complex business needs

\* All the user types of B1, version for SAP HANA which include a connection via DI-API, are eligible to connect via Service Layer



# Thank you

Contact for feedback: [SAPBusinessOne@sap.com](mailto:SAPBusinessOne@sap.com)

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